

## Item 2: Draft Community Investment Policy 2027

**SESSION TYPE:** Workshop

**PURPOSE/DESIRED OUTCOME:**

Direction is sought on confirming key settings in the draft Community Investment Policy 2027.

**DATE/START TIME:**

Tuesday, 1 September 2026 at 11:30am.

**TIME BREAKDOWN:**

Presentation: 20 minutes  
Debate/Discussion: 40 minutes

**PRESENTERS:**

Carrie Williams – Policy Manager  
Marie Day – Community Partnerships Manager  
Roger Davidson – Property Director

**Prepared by:**



**Name:** Carrie Williams  
**Title:** Policy Manager  
21 August 2026

**Reviewed and Authorised by:**



**Name:** Ken Bailey  
**Title:** General Manager, Community Services  
21 August 2026

**ATTACHMENTS:**

|   |                                                           |
|---|-----------------------------------------------------------|
| A | Council workshop – Draft Community Investment Policy 2027 |
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# Draft 2027 Community Investment Policy

Prepared for 1 September 2026 Council workshop

# Agenda

> Items to cover:

1. **Context** – recap from April, process, findings and insights
2. **Draft policy settings** for Council input. Key questions for feedback to inform draft policy include:

| Community occupancy agreements                                                               | Commercial occupancy agreements                                                              | Property sale/disposal or purchase/acquisition                             |
|----------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|----------------------------------------------------------------------------|
| Are the proposed <b>tenure, rental/fees</b> and <b>decision-making</b> settings appropriate? | Are the proposed <b>tenure, rental/fees</b> and <b>decision-making</b> settings appropriate? | Are the <b>principles</b> and <b>decision-making</b> settings appropriate? |

3. **Community spaces requests** – update.

# 1. Context

# What are we trying to do?

## Within the community investment space there is a need to:

- improve consistency and transparency
- ensure decisions are consistent and align with QLDC objectives and
- provide for value for money for investment
- generally, to improve systems, processes and guidance across Council.

## All improvements aim to:

- bring QLDC practices in line with best practice
- improve the support provided to community, as well as visibility of benefits delivered
- simplify and consolidate QLDC's policy instruments across commercial and community leases and licenses
- outline clear principles in this space to create systems and processes that are fair, transparent and increases trust with the community
- provide a consistent framework for balancing competing community needs and demands on Council resources.

*Create a consistent approach across all available levers:*

**QLDC community investment levers**



✓ Operational and project grant funding (done)



➤ Community facility lease and hire agreements



➤ Planning and investment for land and buildings



❖ Service agreements for partnerships (implementation focused)



❖ Capability building and support for the sector (implementation focused)



➤ Commercial occupancy agreements

*A consolidated policy framework aligned to Office of Auditor General best practice*

## Framework structure

### Community Investment Policy

Sets overarching principles and will consolidate into one place:

- Community funding (grants, partnerships)
- Use and disposal of Council land (2014 Property Sale and Acquisition Policy)
- Community and Commercial leases and licences (2019 Community Facilities Funding Policy)



### Guidelines

Operational detail applying policy principles across:

Community Grants & Support • Community Facilities • Leases & Licences

## OAG foundational principles

### Accountability

Decisions are explainable, recorded, auditable

### Openness

Processes and criteria are clear and published

### Value for Money

Focus on meaningful benefit, due regard for costs

### Fairness

Impartial, consistent assessment

### Lawfulness

Acting within policy and legislation

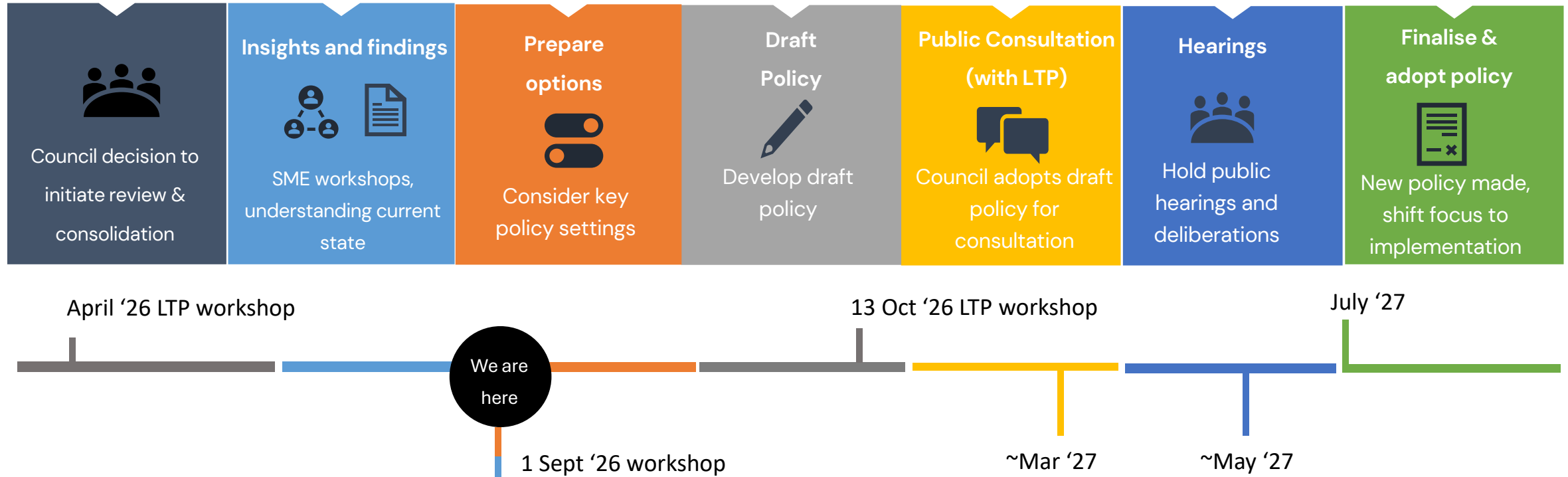
### Integrity

Managing public resources with integrity

# What does good look like?

1. An overarching community investment policy
  - Allows for fairness, transparency, consistency across decision making.
2. Better documentation and justification of the 'why' and the 'who' in guidelines and consistent council reporting to committees/council:
  - E.g. why a lease or license agreement is the way it is,
  - E.g. who are getting leases and licences, ensuring visibility and consistent reporting,
3. Increasing visibility of community benefits and ensuring value for money:
  - Using market value as a way to demonstrate community benefit provided (telling the council story better, and ensuring settings are appropriate)
  - Encouraging greater utilisation of council assets and facilities to cater for growing demand and allow for more flexibility (e.g. more use of multi use facilities, monitoring of utilization and encouragement of maximizing existing assets)

# What does this work programme look like?



## Developing of new processes & ways of working

### Implementation of:

- ✓ Smarty grants system & community grants guidelines
- ✓ Interim process for community requests

### QLDC staff operationalise policy through:

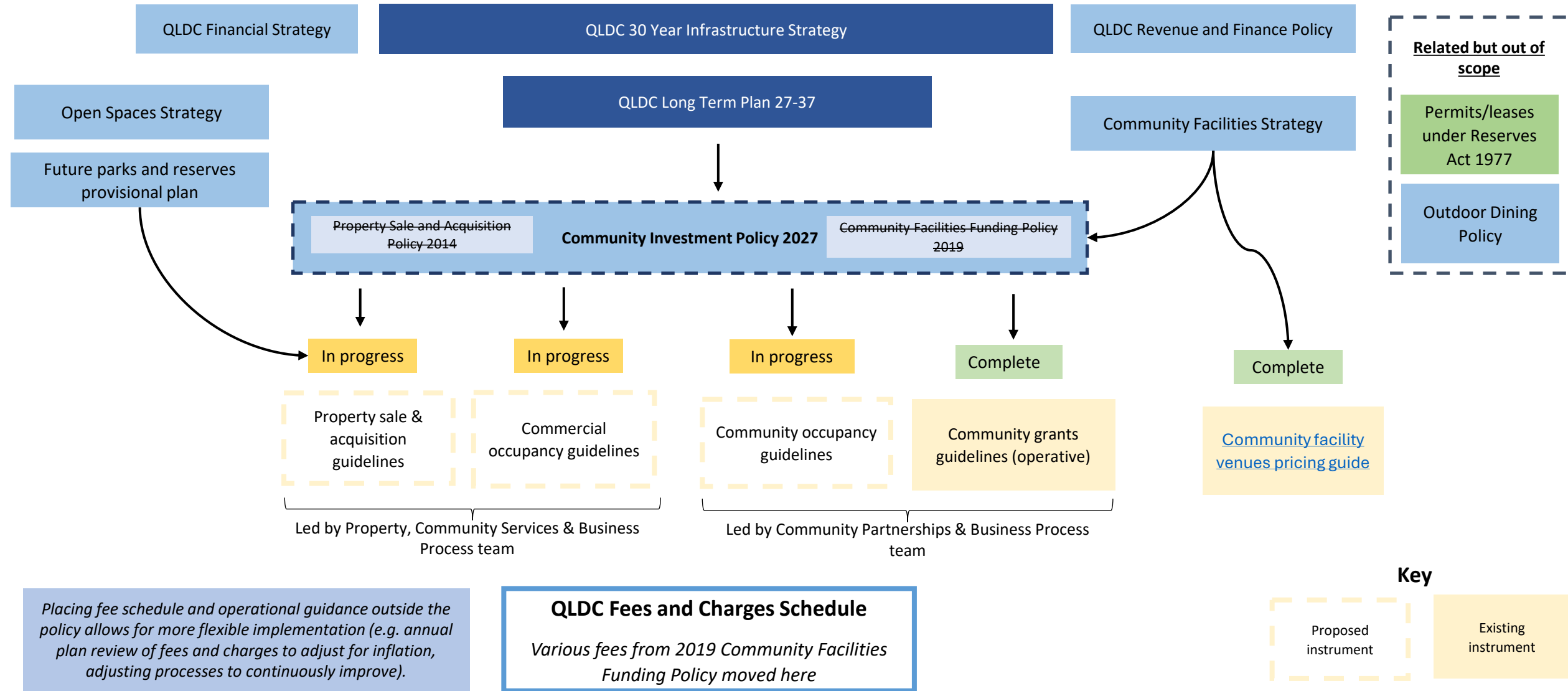
- Community occupancy guidelines
- Commercial occupancy guidelines
- Property sale and acquisition guidelines

Implementation of new processes and further refinement post adoption

# Scope of work

- No new community engagement prior to formal consultation, but desktop analysis of previous engagement and research in this space.
- Guideline approach allows for flexibility as new processes are implemented and prototyped.
- Policy will be overarching document, with guidelines focused on implementing agreed principles, and high-level objectives in their respective areas.
- × Not included are facilities and tenancies that have an existing framework (e.g. outdoor dining, residential tenancies, pop-up stalls) but there is room to incorporate these in future reviews to reduce duplication.

# What will this look like?



# Findings & Insights



## Key findings from existing research and internal SME workshops

- Strong demand for community spaces
- Staff highlighted need to:
  - increase multi-use agreements to maximise use of existing assets,
  - review tenure length/agreements more frequently to maximize usage/outcomes,
  - improve processes and data collection to ensure spaces being utilised to their fullest extent,
  - setting consistent fees and rates for occupancy agreements to better quantify benefit provided to 'tell the story' of how many groups rely on council on way or another.

## Community Funding Dashboard / Smarty Grants

- ✓ Maturity of Smarty Grants system gives comprehensive overview of funding provided across the district
- ✓ Smarty Grants will capture EOI requests for council/facilities in the future (recently introduced process improvement)

## Community occupancy agreements

- Strong demand for community spaces and land by community groups.
- Most community occupancy agreements sit on reserve land, meaning they are subject to Reserves Act provisions/processes.

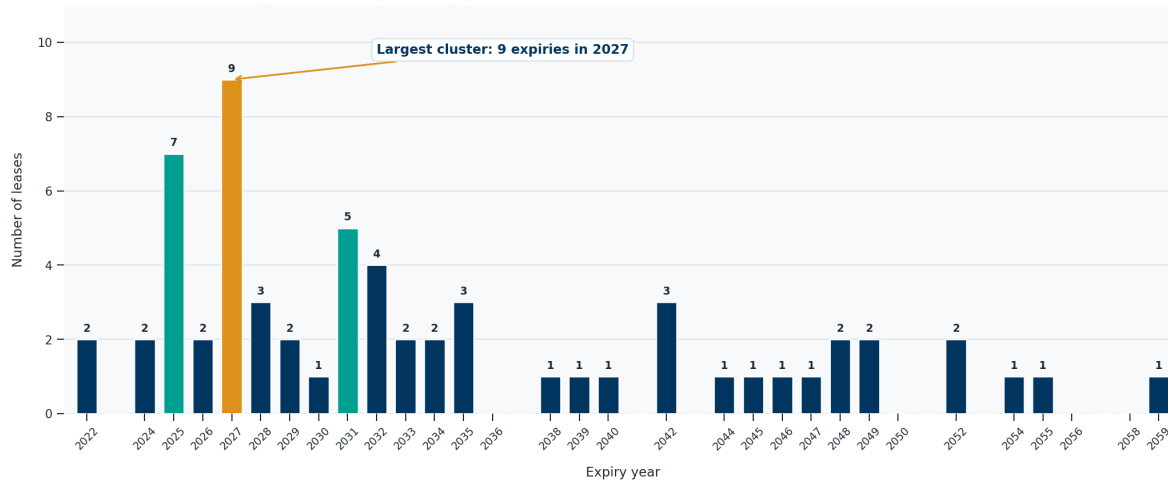
## Commercial occupancy agreements

- Over 500 to 600 different occupancy agreements ranging from grazing, outdoor dining agreements.
- Again, many are on reserve land, outdoor dining, moorings or other tenancy.

# Community occupancy: current state

## Community lease expiries by year

Number of QLDC community leases reaching term expiry



Source: Tenancy schedule expiry dates provided in conversation. Style uses QLDC primary blue and community services teal.

| Area                                   | Approx. location |
|----------------------------------------|------------------|
| Upper Clutha Ward                      | ~24              |
| Queenstown / Frankton / Kelvin Heights | ~19              |
| Arrowtown                              | ~8               |
| Glenorchy                              | ~4               |
| Kingston                               | ~3               |
| District-wide / Other                  | ~6               |

A **Community Group** is a not-for-profit, charitable, or voluntary entity delivering services, activities, or projects.

There are ~64 community occupancy agreements in the district on Council land:

- Average tenure is 16 years
- ~30% are 10-year tenure,
- ~30% <5 years or less, and
- Rest greater than >20 years.

Most are exclusive, i.e. agreement with one party. However, there is some informal agreements or sub-leasing.

Many are on reserve land.

# Commercial occupancy: current state

**Commercial agreements** are agreements with a commercial/for profit person or entity for purely commercial purposes (i.e. retail sales of goods and services, catering, bar facilities).

There are around 500 to 600 commercial tenancies or agreements:

- Many are on reserve land (recreation reserve, just reserve etc.),
- Many related to aerodrome concessions, airport/airstrip leases, grazing, golf courses etc.,
- Many are outdoor dining (~50), moorings (~280), other structures (such as jetties and boats sheds ~110).

Rental rates are largely a function of the type of activity and independent commercial valuation. This process can require negotiation/mediation depending on the party – this can be commercially sensitive.

## 2. Feedback on policy settings

# Key considerations for policy settings



A balance needs to be struck between:

- **Councillors** as representatives and decision makers on behalf of their communities,
- **Staff** obligations to create an efficient process that is easy to navigate, fair, and aligned with Councils' strategic objectives,
- **Community and commercial groups** wanting timely, predictable and transparent process so they can get on with serving their communities and doing good work.

The policy and guidelines needs to strike a balance between high level principles of fairness of process whilst keeping focus on outcomes. This looks like ensuring administration processes for staff, community & commercial groups are not onerous to the extent that they are detrimental to achieving outcomes.

# Community occupancy agreements: tenure and rental rates/fees

## Proposed tenure terms:

| Type of agreement                 | Category                                                                                                                                             | Maximum occupancy |
|-----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|
| Community group licence to occupy | Non-exclusive occupation of Council-owned (or administered) land only or land and buildings or space within a multi occupancy Council owned building | Five years        |
| Community group lease             | Council-owned (or administered) land only                                                                                                            | 10 years          |
|                                   | Council-owned (or administered) land and building                                                                                                    | 10 years          |
|                                   | Space within a multi-occupancy Council owned building                                                                                                | 10 years          |
|                                   | Community Group-owned building on Council-owned (or administered) land                                                                               | 30 years          |
| Rent review/review of agreement   | All                                                                                                                                                  | Every five years  |

Feedback requested: Are these proposed settings for tenure and fees for community occupancy appropriate?

## Proposed rental rates/fees:

Instead of an annual rental fee, proposed costs to community group to be based on:

- > an application and annual administration fee, and
- > community group responsible for outgoings.

### Notes:

- > an alternative of first setting a commercial rate and then applying a discount for community groups has been considered. This is viewed to introduce a level of complexity for the district's leases/licences that is not conducive to consistency for the community, and also could result to community groups requesting QLDC grant funding to cover rental costs.
- > an administrative fee would be based on the reasonable costs of entering into and administration of the occupancy agreement (LGA s.150(4)). This would be set via the QLDC fees and charges schedule and reviewed annually via the annual plan or LTP

# Community occupancy agreements: decision-making

| Application description                                                                                                              | Decision description                                                                                                                                                                                                                                                                                                                                                                                           |
|--------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>New applications and expiry of existing agreements.</b>                                                                           | <b>Freehold:</b> <ul style="list-style-type: none"><li>For Upper Clutha: Report to WUCCB (Wānaka Upper Clutha Community Board) for decision. WUCCB may recommend decision goes to full Council.</li><li>For other locations: Report to Assets and Infrastructure and/or Community and Environment Committee (if indicated) for decision. Committee may recommend that decision goes to full Council.</li></ul> |
|                                                                                                                                      | <b>Reserve:</b> Report to WUCCB for recommendation (if required) followed by a decision of Council.                                                                                                                                                                                                                                                                                                            |
| <b>Renewal of existing agreements</b> under <b>rights of renewal</b> specified in the terms and conditions of the current agreement. | <b>Freehold:</b> As per applicable delegations in delegations register to Chief Executive and/or Council officers.                                                                                                                                                                                                                                                                                             |
|                                                                                                                                      | <b>Reserve:</b> As per applicable delegations in delegations register to Chief Executive and/or Council officers.                                                                                                                                                                                                                                                                                              |
| <b>Applications regarding reserve land</b> that is included in a Reserve Management Plan.                                            | Delegation with Parks and Open Spaces Planning Manager after consultation with the Chair of the WUCCB (if located in the Upper Clutha).                                                                                                                                                                                                                                                                        |

## Points to note:

- An alternative option is for the decision for new applications and expiry of existing agreements to sit with Council in the first instance, rather than going to committee. Staff consider that delegating to committee level with discretion to recommend Council as decision-maker is appropriate.
- It's proposed that the policy sets high level decision-making, with guidelines providing detail on implementation.

Feedback requested: Are these proposed settings for decision-making for community occupancy appropriate?

# Commercial occupancy agreements: tenure and rental rates/fees

## Proposed tenure terms:

- > Standard tenure for commercial occupancy agreements - five years.
- > Right of renewal - five years.

## Proposed rental rates:

- > primarily a % of gross revenue (this is currently 7.5% and will be set in the policy by an independent market valuation).
- > tenants will be required to pay the higher of a base rental fee (determined by an independent market valuation) or 7.5% of gross revenue.
- > responsibility for outgoings with lessee/licensee
- > fees exclude any separate regulatory, consent or licensing charges administered by QLDC or Otago Regional Council
- > ability to charge a one-off administration fee may be charged at the commencement of the agreement.

Feedback requested: Are these proposed settings for tenure and fees for commercial occupancy appropriate?

# Commercial occupancy agreements: decision-making

| Application description                                                                                               | Decision description                                                                                                                                                                                                                                                                                                                                             |
|-----------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Commercial occupancy</b> applications for longer than standard five-year tenure.                                   | <b>Freehold:</b> <ul style="list-style-type: none"> <li>For Upper Clutha: Report to WUCCB (Wānaka Upper Clutha Community Board) for decision. WUCCB may recommend decision goes to full Council.</li> <li>For other locations: Report to Asset and Infrastructure Committee for decision. Committee may recommend that decision goes to full Council.</li> </ul> |
|                                                                                                                       | <b>Reserve:</b> Report to WUCCB (for Upper Clutha agreements) for recommendation followed by a decision of Council.                                                                                                                                                                                                                                              |
| <b>Commercial occupancy</b> applications for a five-year or shorter tenure.                                           | <b>Freehold:</b> As per applicable delegations to Chief Executive and/or Council officers in delegations register.                                                                                                                                                                                                                                               |
|                                                                                                                       | <b>Reserve:</b> Report to WUCCB for recommendation (for Upper Clutha agreements) followed by a decision of Council.                                                                                                                                                                                                                                              |
| <b>Commercial occupancy</b> for retail shops and investment properties for new applications, renewal and rent review. | <b>Freehold:</b> As per applicable delegations to Chief Executive and/or Council officers in delegations register.                                                                                                                                                                                                                                               |
|                                                                                                                       | <b>Reserve:</b> Report to WUCCB for recommendation (for Upper Clutha agreements) followed by a decision of Council.                                                                                                                                                                                                                                              |
| <b>Applications regarding reserve land</b> that is included in a Reserve Management Plan.                             | Delegation with Parks and Open Spaces Planning Manager after consultation with the Chair of the WUCCB (if located in the Upper Clutha).                                                                                                                                                                                                                          |

Where applicable, Council officers may refer any application to the WUCCB and Council for final decision should the application materially affect Council's long-term strategic position, asset ownership, financial exposure, or public accountability obligations.

**Feedback requested: Are these proposed settings for decision-making for commercial occupancy appropriate?**

# Disposal and acquisition of property: considerations + decision-making and reporting

## Principles in making a decision to dispose or acquire property:

- > OAG guidelines
- > Strategic stewardship of Council assets
- > Strategic alignment and clear purpose
- > Deliverability and value for money
- > Community benefit and wellbeing, including

contribution to addressing housing affordability.

- > Strategic reserve and open space provision
- > Risk management and low ongoing Council exposure
- > Consideration of non-ownership options

Feedback requested: Are these proposed settings for principles and decision-making appropriate?

## Policy settings:

- > High threshold (and criteria) for a Council decision to dispose of reserve or open space land
- > Provision for proactive reserve and open space land acquisition

## Description of decision or reporting

Determination that a property is to be disposed, or a property is to be acquired.

A resolution to sell/dispose a property will stipulate an acceptable price range or state whether the Chief Executive is authorised to sell at a price that the Chief Executive determines to be appropriate.

Responsibility for the terms and conditions sale/disposal or purchase/acquisition, subject to any specific matters stipulated as part of the Council resolution.

Ability to negotiate and enter into contracts to acquire property so long as the terms of the sale are conditional upon Council ratification at the next appropriate meeting.

Approve the transfer of reserve land to the Council from developers, the Department of Conservation or any other party, where that land has been identified in the Long Term Plan.

Report of all property disposal and transfer transactions, on an annual basis.

## Decision

Report to WUCCB for recommendation (for Upper Clutha property) followed by a decision of Council.

For an identified land acquisition need that is contemplated in a Council approved plan or instrument (i.e. [Future parks and reserve provision plan](#)): Chief executive OR extraordinary Council meeting (direction needed from Council on this)

Chief executive

Chief executive

Chief executive

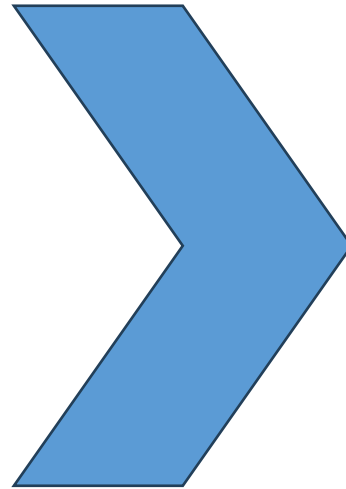
Via Annual Report.

### 3. Community requests update

# Process for community spaces requests

## Why do we want to do this?

- Improve customer experience
- Clarity for QLDC staff
- Meet best practice principles\*
- Alignment with strategic intent and policy
- Management of expectations



## Recommendations

- > Establish one entry point of contact
- > Clear pathways for community groups
- > Decision making framework for QLDC Governance/Officers
- > Fair and transparent process including communication to Community groups

\* Integrity, Openness, Value for money  
Accountability, Lawfulness, Fairness

# Expected outcomes

- **Single Point of Entry**

- A clear and consistent pathway for community groups to submit enquiries.
- All enquiries are captured, tracked, and responded to in a timely manner.
- Reduces confusion for both community groups and staff about who to contact.
- For complex enquiries a Relationship Manager will be assigned

- **Comms**

- Webpage for information and link to enquiry form, for improved transparency and self service
- Templated responses for staff including front line staff

- **Guidelines and decision making**

- A set of *interim* Guidelines to guide enquiries and the allocation of spaces if they become available
- An interim Decision-Making Framework to guide decision making
- Work towards a set of permanent Guidelines to complement the Policy for mid-2027 implementation

# New enquiry process



One entry point of contact – Community Investment Advisor role



Online enquiry form with screening questions



Enquiries triaged and categorised by Community Investment Advisor



Regular reporting to Community & Environment Committee, Wānaka Upper Clutha Community Board